

# Outdoor Tourism Project

## Marketing Strategy

22<sup>nd</sup> March 2013

## CONTENTS

	<b>Page</b>
Background	3
Market Analysis	4
Local Market Review	5
Competitor Analysis	7
Marketing Objectives	8
Consumer Segmentation	9
Marketing Communications	11
Partner Areas	
Outdoor Tourism Project	

## APPENDICES

## BACKGROUND

This document is the Marketing Strategy for the Outdoor Tourism project. The strategy is for the Outdoor Tourism sector of two areas in North Wales (Conwy and Gwynedd) and three areas in Leinster (Kildare, Kilkenny and Dún Laoghaire Rathdown). The strategy is prepared by Dún Laoghaire Rathdown County Council on behalf of the partners in the Outdoor Tourism Project which is part financed by the European Regional Development Fund (ERDF) through the Ireland Wales Programme 2001-2013, INTERREG 4A. (See Appendix 1 for Introduction to the Outdoor Tourism Project).

Dún Laoghaire Rathdown County Council appointed an external provider through a tender process in July 2012 to undertake a study on the combined Outdoor Tourism potential of each of the project partner areas in an international context. This was through, 1) a baseline study of the Outdoor Tourism providers in each partner area, 2) a study into the Outdoor Tourism potential of each area and 3) recommendations for a joint Marketing Strategy document.

The primary purpose of the outputs from this study was to explore new and innovative approaches to marketing the Outdoor Tourism sector, inform the marketing strategy report and subsequent joint marketing communications activities for the Outdoor Tourism Project in years two and three of the project. This report was completed on schedule in December 2012.

## MARKET ANALYSIS

Outdoor Tourism is defined for this project as ***comprising visitor participation in outdoor activities either as part of a holiday or day trip, or as the main activity.***

Adventure and activity tourism is a growing sector as people look to holidays and breaks to deliver engaging and participative experiences rather than passive sightseeing. This has led to many national tourist boards developing the outdoor tourism offer in the destination development strategy and marketing campaigns<sup>1</sup>.

Mintel's<sup>2</sup> latest study reported that activity needs to be incorporated alongside other destination activities such as shopping and sightseeing (activity/relaxation). The big opportunity is 'soft adventure', which is more mainstream and makes up 90% of the market. The most common activities, for activity holidays in Europe, are walking/hiking, cycling, watersports, mountaineering and mountain biking (WATTA)<sup>3</sup>.

The available consumer data and market intelligence for outdoor tourism is limited. For Ireland there is no reliable, comprehensive data on tourism – or activity tourism – in the partner areas to Dún Laoghaire Rathdown, Kildare and Kilkenny. Ireland as a whole receives around 3.7M international visitors each year. The GB market is 42%, US 36% and N Europe 15%. Dublin and the South West are the most visited regions. Specific research into Adventure & Activity tourism suggests that 64% participants were domestic, 11% from GB, 17% from Europe and 7% from N America. There is no data on domestic trips from Dublin or research among Dublin residents on their perceptions or attitudes to engaging in activities in the project areas.

There is more general visitor data available for North Wales as well as specific studies on adventure tourism in North West Wales. There is little on consumer expectations, perceptions and satisfaction with the outdoor experiences on offer. Adventure tourism is a significant sector in North West Wales worth £140 million pa, supported in part by 3 national centres. North Wales gets around 8M staying visitors each year from the UK, and 17M day visitors. Three-quarters of staying and just under two-thirds of day visitors visit North West Wales. The vast majority (88%) come from England – mostly from the North West.

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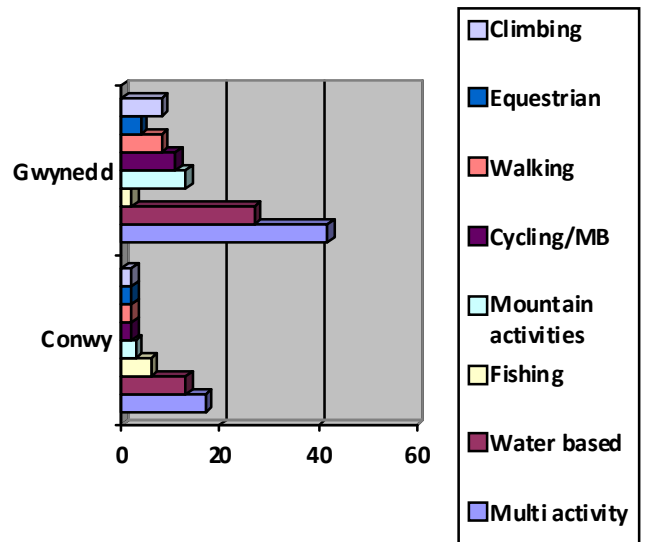
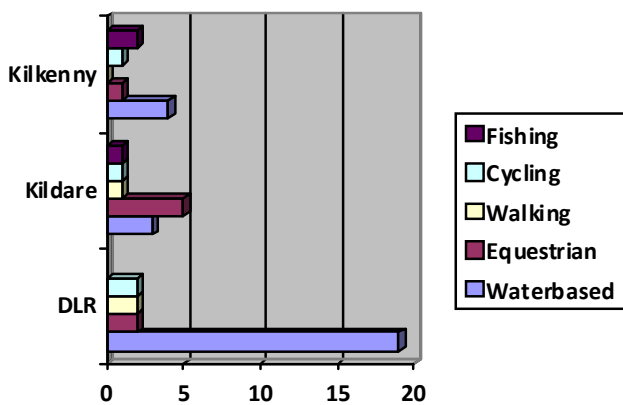
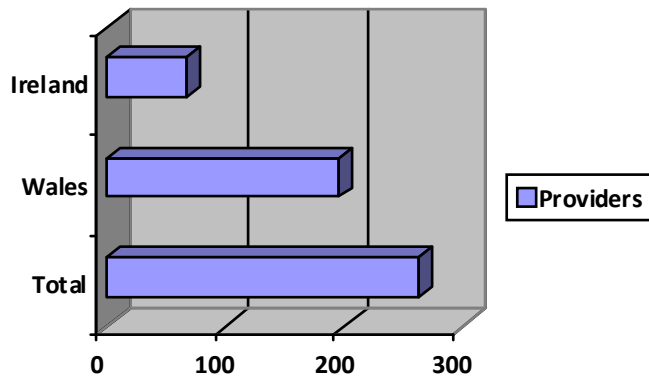
<sup>1</sup> Blue Sail Report - Working Paper 1 Market Data & Consumer Research

<sup>2</sup> Mintel Report: Activity Holidays UK February 2010

<sup>3</sup> World Adventure Travel Trade Association

**LOCAL MARKET REVIEW**

Blue Sail conducted research of each partner area and identified 264 outdoor tourism businesses – 68 in Ireland and 196 in Wales.



It is immediately clear that the sector in Wales is much more developed than that in Ireland. It is also obvious that the types of activities vary markedly across the partner areas. There are critical success factors from the comparator work of other successful outdoor destinations<sup>4</sup>.

In order to develop a marketing strategy for the Outdoor Tourism proposition for the partner areas, it is important to have a specific frame of reference or positioning of the ‘product’ that we wish to market. In order to focus the communication the main opportunities for each area are outlined below.

<sup>4</sup> Blue Sail: Working Paper 4 Comparator Research

Segment	Description
Tasters	People trying out an outdoor activity for the first time, or undertake on a very occasional basis
Learners	People learning an outdoor activity, or improving skills
Dabblers	People who occasionally take part in an outdoor activity as part of leisure time or on holiday. They have some knowledge and skill, but are not regularly active
Enthusiasts	People who regularly do outdoor activity, are keen and have a level of knowledge and skill

### Conwy and Gwynedd

The main opportunity for Wales is to promote the partner areas of Conwy and Gwynedd as one destination, under the Snowdonia brand and for outdoor tourism; branding, repositioning and packaging the offer for a new larger dabbler and taster market which is where growth potential lies; and continue to inspire and cater for enthusiasts via the infrastructure of skills, centres, events and the quality of the destination offer. This will be addressed with the new Destination Management Plan for Gwynedd and also with the work commissioned by North Wales Tourism Partnership on a new brand for Outdoor Tourism in North Wales.

### Kilkenny & Kildare

For Kilkenny & Kildare the opportunity lies in the Barrow Valley, which is already a focus for investment and development. The Barrow Valley, with walks and cycle routes along the Grand Canal and Barrow River, kayaking on the water, and a focus on activity hubs at key strategic locations such as Athy and Graiguenamanagh, is where the potential for outdoor tourism lies.

### Dún Laoghaire Rathdown

For Dún Laoghaire the best opportunity lies in watersports and water-based activities along the coast. As an urban hub of the capital city with direct access and vistas to the water, it is well placed to be the focus of communications for the area. The Dublin Mountains provide a secondary opportunity, as it is a less developed tourist destination.

## COMPETITOR ANALYSIS

The Comparator Research (Working Paper 4)<sup>5</sup> provides a summary of the research and lessons drawn from 16 comparator destinations across the world and what could be drawn from other sectors.

The key learning's from this competitor destination analysis are as follows:

- Claim distinctive territory – “we are the place for...”; named trails, get the branding and positioning right
- Images and descriptions of the destinations – should be clear and strong
- Highlight viewpoints that are only available during activity
- Events to support branding and create awareness and visits
- Practical information - how to book, where to stay
- Inspire & give ideas - recommendations, top tips, to-do lists, meet-the-locals
- Creative packages – joint promotions with special offers
- Transport – creative approaches, inclusive packages, pick-ups and drop-offs, deliver bikes
- Easy booking - priced, quick quotes, flexible options, online booking
- Extend / Enhance the experience – culture, attractions, joint-ticketing, wildlife, organised safaris, work with non-tourism businesses
- Rounded experiences – importance of food, accommodation, retail etc
- ‘Snackable’ content – packages, ideas, tips - for consumers and for others to carry

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<sup>5</sup> Blue Sail – Working Paper 4 Regional & National Marketing

## MARKETING OBJECTIVES

The audit and overview suggests that the opportunities for each of the areas are very different - because of their natural assets, location and maturity of their outdoor sector.

For Wales the potential lies more towards marketing the offer more effectively, supported by development of the product. To realise its potential Ireland will require investment in product and business development supported by marketing of what is currently on offer, developing and extending this over time. The Barrow Valley area of Ireland in particular will need a specific Destination Development strategy formulated to realise its potential. For the purposes of this document and the Outdoor Tourism Project Marketing objectives, the focus is on Marketing and Communications only.

## AIM

To explore new and innovative approaches to marketing the Outdoor Tourism sector in the partner areas

## OBJECTIVES

The marketing objectives are a clear expression of what the project wants to achieve in marketing terms in the project period and beyond;

1. Effectively communicate and promote the partner areas Outdoor Tourism proposition with the identified target audiences
2. Encourage collaboration and joint marketing initiatives on the project between partner areas and businesses within each area
3. Explore a joint Marketing approach based on all partner areas, in consideration of the unique nature of each
4. Capitalise on existing regional and national tourism campaigns and initiatives



## CONSUMER SEGMENTATION

Identifying the appropriate customer segments will help the project to target the most appropriate promotional activities as well as develop relevant products and services in the future. It is important for directing a particular marketing strategy to a specific group to understand the target audience and therefore select the most appropriate method of communication.

### Dún Laoghaire Rathdown

Fáilte Ireland and Tourism Ireland have identified relevant segments for Ireland which are relevant to the Irish project areas. For this area the **Social Energisers** segment would be the most applicable. This segment are young , 20s and 30s, groups of friends primarily interested in city breaks and looking for days packed with activity and adventure and lively, fun nights. Dublin is already attracting these people and Fáilte Ireland has identified this segment as offering the best prospect for growth. It is also looking to refresh and extend the Dublin brand which provides an ideal opportunity for Dún Laoghaire to take its outdoor tourism product to market.

### Kildare and Kilkenny

**Great Escapers** are the most suitable market segment for this area. This audience are younger couples, some with babies and young children, primarily interested in a relaxing, rural holiday where they can connect with the landscape and soak up its beauty. They want to get off the beaten track – but they are looking for a bit of a “wow” factor too. They are also looking for ancient sites, landmarks as well as authentic pubs and eating places.

### Gwynedd and Conwy

Visit Wales has identified the **Independent Explorer** segment as the priority market for holidays in Wales. This segment includes people at all life stages, 30+, families and post-family. They are independent in thought and action – these people don't follow the crowd. They like to visit places which offer something different and authentic. They are very active and enjoy learning and participating in new things. They are relatively affluent.

**Segmentation Target Summary**

<b>Project Area</b>	<b>Outdoor Segments</b>	<b>Visitor Segments</b>	<b>Domestic Target areas</b>	<b>Foreign Market</b>
<b>Ireland</b>				
Kilkenny & Kildare	Dabblers, Tasters, Learners	Great Escapers	Kilkenny, Dublin	GB & other international markets
Dún Laoghaire		Social Energisers	Dublin	
<b>Wales</b>				
Gwynedd & Conwy	Tasters, Dabblers, Enthusiasts	Independent Explorers	North England	Germany/Holland and France/Spain/Ireland USA

## MARKETING COMMUNICATIONS

The market research commissioned by the Outdoor Tourism Project on each partner area has facilitated a report conducted by Blue Sail which has given suggestions on how to market each area<sup>6</sup>. This individual area marketing approach needs to be understood and a focus agreed, in order to facilitate the joint marketing approach and therefore meet the objectives as set out in the project.

### Partner Areas' Individual Marketing Approach

#### Wales

Gwynedd and Conwy

Vision – North Wales...The best outdoor activity destination in the UK

1. Establish a strong Outdoor Tourism Partnership with the outdoor businesses, tourism organisations and stakeholders in Gwynedd and Conwy mirroring the current delivery structure for this project i.e. led by the tourism team in Gwynedd Council
2. Gwynedd & Conwy's outdoor tourism offer should be given a clear, strong brand based on the positioning identified. The area should take into consideration the Visit Wales 2020 Tourism Strategy, which sets out the high level aspirations for tourism in the region from 2013 to 2020.
3. Direct Promotion: Gwynedd & Conwy area is market ready, but given that budgets are likely to be small the focus should be on PR (press releases, press trips, trade meetings and media relationships) and social media as the most cost-effective way to reach the target markets.
4. Promotion: Utilise the channels provided by Visit Wales and Visit Britain to extend the reach, by providing them with content (copy, images, video, press itineraries, competitions, and packages).
5. Business sector cross promotion: Work with the businesses in the outdoor sector encouraging them to use the branding, the marketing collateral, develop packages for the dabbler and taster markets, cross-promote each other on the web and social media channels.

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<sup>6</sup> Blue Sail : Assessment of the Potential of Outdoor Tourism

## Ireland

Outdoor tourism in the three Irish areas - Dún Laoghaire Rathdown, Kildare and Kilkenny - sits within a promotional context of international marketing delivered by Tourism Ireland, domestic marketing by Fáilte Ireland and local destination promotion and events run primarily by the local authorities. Outdoor tourism does not feature heavily in any of the current promotion.

### Dún Laoghaire Rathdown

Vision – Dublin Bay’s cultural and leisure waterfront destination

### Kildare and Kilkenny

Vision – The best place in Ireland for slow travel on or beside the meandering river with gentle landscapes and wooded valleys

1. GB Path to Growth Strategy - ensure that both product/experience development and marketing fits with the new GB Path to Growth strategy ensuring that itineraries, products and experiences fit within the priority experience pillars of ‘Vibe of the City’ for Dún Laoghaire , and ‘Getting Active in Nature’ for Kildare & Kilkenny.
2. Dublin City Plus Strategy - Dún Laoghaire Rathdown has an opportunity to fit with the Dublin City Plus strategy which Fáilte Ireland is pursuing to reposition Dublin in international markets. This provides a huge opportunity for the area to extend the reach to the Dublin visitor target audiences as a day trip destination.
3. Promotion - While the current offer is in its infancy there are still experiences, businesses and products which are mature enough that can be taken to market. These should be articulated in ways which will appeal to the recommended target markets and promoted through local, regional and national channels. The promotion of the areas should however be conservative until the outdoor tourism offer increases over time. Then the marketing can be stepped-up.
4. Tourism Agencies – It is important to feed content and news on each area on a regular basis to Fáilte Ireland and Tourism Ireland to exploit their channels. This is an on-going task.

Fitting with the Business Development objective for the Outdoor Tourism Project it is important to develop and support the creation and co-operation of outdoor tourism business networks in each area. Businesses that deliver the products, services and experiences will need support to develop practical skills, marketing capability and collaborative working.

## **Outdoor Tourism Project Marketing Strategy**

Each of the three partner areas, Gwynedd and Conwy, Dún Laoghaire Rathdown and Kildare & Kilkenny, are very different in terms of their natural assets, product offer, their maturity as an outdoor destination, and their target audience. As a result of this disparity the joint marketing activities should be carefully chosen in order to best serve all partner areas.

## **Marketing Communications**

### **1. Collateral:**

All marketing communications to consumers and the travel trade will require high quality collateral designed to specifically target the Outdoor Tourism market in a coordinated and professional way. This is currently fragmented in Wales and does not exist in Ireland in the partner areas. The project can co-ordinate the production of some new or redesigned marketing collateral.

- Photography: by commissioning new photography it will ensure the partners have copyright-free images of each destination with people engaged in relevant outdoor activities. These images should clearly illustrate the destination as well as the activity and should fit the target market as well as the positioning.

- Itinerary development: by producing 'snackable content' i.e. itineraries, top facts, lists of top things to do, with examples of copy describing the activity and the destination.

- Toolkit: This collateral can be made into a 'toolkit' available free to businesses and can be used in promotion by the local agencies, regional tourism partnerships and national tourist boards. The resource can be added to over time, and provide an important legacy for the project.

- Collateral: An audit of the existing marketing material for each area will need to be undertaken by each project officer. If deemed necessary or suitable, budget can be allocated to design

appropriate marketing collateral using the new toolkit. This can be used for online or printed purposes.

## **2. Trade & Consumer Outdoor Shows/Exhibitions:**

The Wales' offer is market-ready and Ireland's requires development. But there are opportunities for Wales to have a presence at shows (i.e. the Outdoors Show or the Active Travel Show). In order for this to be of benefit to the Irish partners, the Irish colleagues and/or businesses could shadow them, attend the show/trade event and network to learn more about the potential market. There would be key learning's to take on board for the future. Another opportunity is to link in with the national tourist organisations and have a representation from the partner areas (a local business or partner) at a show where they will have a stand, if that was possible.

## **3. Social media/digital links:**

The Outdoor Tourism Project has a website and facebook page. This allows for partners and local businesses in each area to promote and network on various activities/events etc. This follows the first step at a simple level that the project can engage online. The project will further enhance those online connections by creating an online virtual map of the service providers in each area on the website.

Current marketing trends indicate that businesses and destinations should be engaging and following each other on social media, retweeting, installing website links, inviting guest blogs etc. This is an inexpensive, effective and measurable method of marketing communications and provides a valuable new route to market. New social media platforms will be explored to facilitate the use of this medium to communicate with the outdoor activity target market and businesses within the sector. Initial research indicates that Google+ would be a suitable social media tool.

## **4. PR:**

Engaging with the press is an effective way to develop and promote a tourist destination. Organising PR trips with selected journalists, bloggers and writers would be an effective promotional tool. It could also be a collaborative effort through the Outdoor Tourism Project to put a cross-boarder consumer itinerary experience together. This would create a unique consumer experience that writers would be very interested in sharing as it offers something different and therefore worthy of telling the story.

## **5. Events:**

Events are a valuable way to drive visits and to reinforce the destination brand for particular activities. Events are both about product development and marketing. The strategy would be to encourage 'outdoor activity' themed events for the partner areas, identifying which events should be supported and developed. There is an opportunity to encourage a cross-boarder approach to certain events that are suitable i.e. watersports.

## **Marketing Insight Development:**

### **1. Learning journeys:**

Familiarisation trips between project areas so that businesses can experience first-hand the visitor offer. This can be extended into learning journeys taken by businesses and those who support the sector, to comparator destinations. These comparator learning journeys should involve groups from Wales and Ireland to encourage networking and professional relationships. The approach to the journeys should be structured so that participants conduct research in advance, capture information and learning in the destination and be prepared to provide feedback to their peers after the visit. It should focus on outdoor activities and the wider tourism offer.

### **2. Marketing skills development:**

From the marketing review of individual outdoor tourism businesses there is a need to develop marketing skills. This could be done through joint workshops, seminars, secondments and action learning sets, either within the Ireland/Wales area or an alternative destination for learning.

### **3. Third party engagement:**

Partners should be innovative and establish links with other relevant external organisations that can benefit the project. Where feasible, partners should engage with relevant local educational institutions on the theme of Outdoor Activity and Marketing relating to the sector. This educational link with the project can both capture and promote the project through academic papers and research.

## OUTDOOR TOURISM ACTION PLAN

Based on the Marketing Strategy developed the following is the specific Marketing Action Plan for the Outdoor Tourism Project utilising the available shared cost budget.

Marketing Objectives	Actions Required	Key Metrics	Responsibility	Timeframe
<b>Effectively promote partner areas</b>	Press familiarisation trips	1 press trip to each area during the project duration (or combined trip)	EC/AW to organise in coordination with national tourist bodies and project partners	May-14
	Promotional Marketing collateral	Audit of OT oriented material	Each partner to assess & produce material as required using the new toolkit materials and branding applicable to each area. In conjunction with Tourism agencies	Sep-13
<b>Encourage Collaboration</b>	Photography & Itinerary copy Toolkit	1 Toolkit produced for each area	EC to issue tender & partners to facilitate in each area	May – Sept 13
	Marketing Insight development	Marketing Fam trip for partner businesses	EC to lead, Project coordinators to organise	Sep -13 & April 14
<b>Joint Marketing Approach</b>	Online collaboration – Social Media, Facebook ,Google+, YouTube	Sites established for Outdoor Tourism sector in each area	EC to recommend digital media & partners to manage each areas online campaign	May -13 then ongoing
<b>Capitalise on national promotion</b>	Link in with national tourism agencies with new toolkit	New collateral used in 1 national campaign in 2013/14	Partner Project coordinators	2013/14
	Wales partner to attend trade event (Irish partner to shadow)	1 trade networking event in 2013/4	AW to organise (EC to coordinate Irish Partners)	2014



## APPENDIX 1

### INTRODUCTION TO THE OUTDOOR TOURISM PROJECT

The Outdoor Tourism (OT) project is a three year project (January 2012 to December 2014) with six project partners:

Conwy County Borough Council (Wales) (Lead Partner)

Kildare County Council (Ireland)

Gwynedd Council (Wales)

Kilkenny Leader Partnership (Ireland)

The Outdoor Partnership (Wales)

Dun Laoghaire-Rathdown County Council (Ireland)

#### 1. SUMMARY

The project has been initiated so as to boost outdoor tourism in all partner areas. Partners recognise that OT has the potential for further growth; they also recognise the importance of exchanging good practise and learning across borders both as strategic partners but also for professionals working in the outdoor sector. The OT project aims to understand the issues that currently prevent growth for businesses in the outdoor sector and address these challenges through cross border support. The project provides partners with the opportunity to explore new and innovative approaches to marketing the OT sector. The project also intends to develop a link between local communities in Wales and Ireland and their natural environment, inspiring our communities to take part in recreational and voluntary activities and to aspire to work in the outdoor tourism sector.

OT has 4 pillars of interlinking activity (see aims) with partnership working between the 6 partners at its core. The uniqueness of the project is its approach to joint working, partners each leading on areas of activity, and shared costs between partners a key feature, enforcing joint working and a cross border approach to developing solutions to grow Outdoor Tourism.

#### 2. AIMS

The aims of the project are:

1. To coordinate the project partnership by ensuring the project objectives are delivered according to cost, time and quality constraints.

2. To foster business development in outdoor tourism by up-skilling local businesses and developing relationships between outdoor tourism professionals.
3. To support employment opportunities in outdoor tourism by increasing the number of qualified professionals trained to lead in outdoor activities.
4. To develop innovative marketing initiatives in outdoor tourism
5. To engage with communities in outdoor activities by encouraging the creation of a generation of local outdoor activity enthusiasts and promoting social and health wellbeing
6. To disseminate the project results

### 3. OBJECTIVES

The objectives of the project are:

1. To ensure appropriate management, mentoring, financial and evaluation activities during years 1, 2, 3.
2. To develop 1 cross-border business needs analysis for 30 businesses (15 in Wales and 15 in Ireland) in year 1.
3. To deliver 1 cross-border business scheme for 30 businesses (15 in Wales and 15 in Ireland) in years 2 and 3, including 8 focused training courses (4 in Wales and 4 in Ireland) and 4 cross-borders thematic seminars (2 in Wales and 2 in Ireland).
4. To prepare 1 cross-border accredited outdoor instructor apprentice scheme in year 1.
5. To implement and evaluate 1 18-month cross-border accredited outdoor instructors apprentice scheme for 12 people (6 in Wales and 6 in Ireland) in year 2 and 3.
6. To organise 1 cross-border evaluation of outdoor tourism potential in year 1.
7. To support the development of 1 multi-location packages in year 2 and 3.
8. To ensure joint marketing activities, including the development of a joint marketing strategy and joint promotional tools, in years 2 and 3.
9. To ensure social inclusion by carrying on 1 equal opportunities impact assessment and 1 sustainable impact assessment in year 1.
10. To encourage community interest by 1 raising interest campaign (taster sessions, development programmes, and coaching programmes) in each partner localities during years 1, 2, 3.
11. To support community awareness by 1 raising tourism campaign (workshops with locals, citizen charter) in each partner locality during years 1, 2, 3.
12. To ensure appropriate dissemination and networking activities during years 1, 2, 3.

The project start date was January 2012. It will end on the 31 December 2014.